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FOREIGN CROPS AND MARKETS.

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Feature of Issue: FRUIT

WHEAT PRODUCTION PROSPECTS IN THE NORTHERN HEMISPHERE

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CURRENT MARKET CONDITIONS

Easier prices ruled on hogs at Berlin and lard at Hamburg during the week ended June 7. American and Canadian Wiltshire sides at Liverpool declined slightly, both selling at \$23.90 per 100 pounds. Danish sides strengthened. European butter prices showed little if any change from the preceding week. The English barley market is reported as inactive, but steady, with practically no English offerings. See pages 48 and 63.

NORTHERN HEMISPHERE FRUIT PROSPECTS

Present indications point to good crops of practically all deciduous fruits in the United States and Canada. General conditions in England and on the European continent, however, are only average or below. In those areas, prospects for pears are generally more favorable than for apples. European plum prospects are varied but a fair crop may be expected. Indications in Spain point to a reduced crop of raisin grapes, while raisins and figs in the Smyrna district show signs of giving returns larger than last year. See page 48.

C R O P P R O S P E C T S

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Canadian official estimates of total acreage and production are not yet available. The Northwestern Grain Dealer's Association have estimated an increase of 7.9 per cent over last year's wheat acreage in the Prairie Provinces and a decrease of 4.3 per cent for rye. In southern Alberta wheat is only fair but elsewhere in the west it is in good to excellent condition although the prevailing warmth made more rain desirable. The recent warm weather has improved crops in the east and they look well although still late.

The European wheat crop exclusive of Russia is expected to be below the bumper harvest of 1925 although conditions so far point to a crop above the average. Forecasts and estimates of production received to date from Spain, Bulgaria, and Poland are below estimates for last year while the forecast for Hungary is above last year's figures. The yield in France is expected to be well below the high yield of 23.9 bushels to the acre obtained last year. The latest official condition report is for May 1 when winter wheat condition was reported at 69 and spring wheat 68 compared with 76 and 73 respectively on May 1, 1925, according to the French system wherein 60 represents a fair condition, 70 medium and 80 good. A correlation of this May 1 condition of winter wheat with final yields for the years 1902 to 1925 would indicate a yield per acre of 19.1 bushels as compared with an indication of 21.6 for last year computed in the same way. Last year, however, conditions from that time to the time of harvest were increasingly favorable, resulting in an actual yield of 23.9 bushels to the acre, whereas this year to date the crop has deteriorated.

Conditions of winter wheat in Germany on June 1 indicated a yield of 27 bushels per acre compared with an indicated 28.9 based on similar reports for 1925. The actual yield of all wheat in 1925 as shown by acreage and production figures was 30.8 bushels. Germany had general rains during the early part of June and droughty conditions were for the most part relieved. A satisfactory condition of nearly all grain crops was reported about the middle of June. Italy's wheat crop for the current season has been estimated to be about 1/12 below last year's harvest according to Consul Dominian at Rome. Last year's crop was estimated at 240,849,000 bushels. Italy's wheat requirements for all purposes for the past five years have been about 300,000,000 bushels a year.

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In the central European countries for which no estimates have been received the outlook is still generally good although crop prospects are slightly less favorable than before the heavy torrential rains which were accompanied by inundation and in some areas by winds about the middle of June. A continuation of warm dry weather is needed for a good outturn. Reports for Rumania point to a big crop of winter wheat and barley as well as of spring sown cereals. The damage done by the heavy rains about the middle of June is relatively insignificant in that country in comparison with the good done to the crop. In Austria and Czechoslovakia official reports of condition on June 1 were above average but somewhat poorer than last year. For Yugoslavia reports had been generally favorable in the important wheat growing areas. A cable from the International Institute of Agriculture reports further heavy storms in Hungary about July 1 but the rains only caused damage along the river. A little later the weather was drier and warmer which improved the crop condition. A trade report for Latvia dated June 20 states that in Kurland the condition of the crops is much improved due to warmer weather and that in the area of Mitau a fair crop is expected. A general average crop of rye is also looked for. The cold wet weather of May in England continued throughout most of June but during the last week in June and the first week in July the weather was fair and bright which was much needed.

Practically all reports from Russia have indicated that the outlook is promising for cereal crops in the most important grain producing sections of the country. Trade reports for Russia from Charkow dated June 12 say that in the Ukraine winter crops are expected to give an average yield, while the condition of the spring crops is slightly better than at this date last year, and, with favorable weather, yields of the various cereals should be about equal to those of the previous season. Conditions of winter cereals in the Ukraine on June 1 as reported by the International Institute of Agriculture were generally good.

Wheat production of three North African countries, Morocco, Algeria and Tunis, amounts to 64,595,000 bushels compared with 65,391,000 bushels for last year. No forecast has yet been received for Egypt but the crop condition of July 1 indicates a yield equal to 97 per cent of the average for the past ten years, as compared with 98 per cent on June 1.

The Arabian Sea monsoon has been generally active on the west coast of the peninsula in India, extending on July 16 to the Central Provinces.

The Weather Bureau reports seasonable weather in Argentina for the week ending July 5. The temperature was normal in both the northern and southern wheat zones, where ploughing and seeding for the coming wheat crop is now taking place. Rainfall averaged 0.1 inches in each zone in comparison with 0.4 inches in the north the week before and 0.6 inches in the south. The season opened particularly well in Australia and fallowing and crop operations have proceeded under especially favorable weather conditions throughout the entire

CROP PROSPECTS, CONT'D

wheat belt. Since the latter part of March good rains have occurred and mild temperatures have prevailed.

WORLD WHEAT CROP

Acreage

Crop and countries	: Average :	1909-13	1924	1925	1926	1926 is of 1925	: Per cent
	: 1,000 :	1,000	1,000	1,000	1,000		: Per cent
	: acres :	acres	acres	acres	acres		:
United States.....	47,097:	52,364	51,847	57,687:	111.3		
Canada (winter).....	1,053:	774	794	753:	94.8		
Europe, 14 countries.....	59,646:	55,113	56,373	56,034:	99.4		
North Africa 3 countries....	6,531:	7,061	7,632	7,802:	102.2		
India.....	29,224:	31,181	31,636	30,288:	95.7		
Total 20 countries.....	143,551:	146,493	148,635	152,564:	102.6		
Estimated World Total excluding Russia.....	197,800:	214,900	220,400				
	: Production forecasts and estimates						
	: 1,000 :	1,000	1,000	1,000	1,000		: Per cent
	: bushels :	bushels	bushels	bushels	bushels		:
United States.....	690,108:	862,637	666,485:	767,357:	115.1		
8 foreign countries a/	703,205:	643,533	721,550:	701,658:	97.9		
Total 9 countries	1,399,313:	1,506,150:	1,390,895:	1,469,015:	105.8		
Estimated World Total excluding Russia.....	3,006,000:	3,098,000:	3,331,000:				

a/ Hungary, Spain, Bulgaria, Poland winter, Algeria, Tunis, Morocco and India.

GRAINS OTHER THAN WHEAT: a/ Acreage, average 1909-13 annual 1924-26

Crop and countries	: Average :	1909-13	1924	1925	1926	1926 is of 1925	: Per cent
	: b/ :						
RYE c/	: 1,000 :	1,000	1,000	1,000	1,000		: Per cent
	: acres :	acres	acres	acres	acres		:
Total, 16 countries	29,415:	26,820	28,024	26,833	26,833		95.8
BARLEY	:	:	:	:	:		
Total, 10 countries.....	17,619:	16,629	17,712	17,286	17,286		97.6
OATS	:	:	:	:	:		
Total, 12 countries.....	26,695:	24,364	24,287	24,515	24,515		100.9

a/ These figures do not include revised estimates for the United States which were published July 10. b/ Where changes in boundaries have occurred as a result of the world war, estimates have been adjusted to correspond with the area within the postwar boundaries. c/ Estimates of earlier years for comparison are final estimates of the total winter and spring area harvested.

C R O P P R O S P E C T S, C O N T ' D

RYE: a/ Production, average 1909-13, annual 1924-1926.

Crop and Country	: Average : 1909-13 : 1924 : 1925 : 1926				: Per cent : 1926 is : of 1925 : Per cent
	RYE	1,000	1,000	1,000	
Total, 4 countries b/.....	: bushels	: bushels	: bushels	: bushels	:
	102,645	116,836	118,736	105,939	89.2

a/ These figures do not include revised estimates for the United States which were published July 10. b/ Spain, Bulgaria, Hungary and the United States.

CEREAL CROPS: Production, 1924 and 1925

Crop and country	: 1924		: 1925		: Per cent 1925 is : of 1924 : Per cent
	WHEAT	: 1,000 bushels	: 1,000 bushels	:	
Total, 44 countries	3,068,305	:	3,298,548	:	107.5
Estimated world total excl. Russia	3,098,000	:	3,331,000	:	
RYE	:	:	:	:	
Total, 29 countries	729,753	:	1,006,751	:	138.0
Estimated world total excl. Russia	743,000	:	1,021,000	:	
BARLEY	:	:	:	:	
Total, 39 countries	1,062,889	:	1,262,648	:	118.8
Estimated world total excl. Russia	1,207,000	:	1,415,000	:	
OATS	:	:	:	:	
Total, 37 countries	3,644,038	:	3,930,745	:	107.9
Estimated world total excl. Russia	3,675,000	:		:	
CORN	:	:	:	:	
Total, 23 countries	3,220,387	:	3,867,237	:	120.1
Estimated world total excl. Russia	3,731,000	:		:	

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SUGAR BEETS

The excessive rainfall throughout Europe during the latter part of June has been followed by favorable weather conditions in almost all beet growing sections of the continent, according to a cabled report from F. O. Licht to a trade paper. Higher temperature, however, would be very welcome for drying up the excessive moisture and for furthering the development of the beets.

SUGAR BEETS: Area in specified European countries average 1909-13,
annual 1924 - 1926

	: Average :				: Per cent
	: 1909-13 :	1924	1925	1926	: 1926 is
	:	:	:	:	: of 1925
	: <u>Acres</u> :	<u>Acres</u>	<u>Acres</u>	<u>Acres</u>	: <u>Per cent</u>
Total, 12 countries reporting	: 3,602,127	: 3,752,398	: 3,562,866	: 3,508,900	: 98.5
New estimates received:	:	:	:	:	:
Russia	: 1,483,553	: 860,000	: 1,167,800	: 1,350,000	: 115.6
Total, 13 countries	: 5,085,680	: 4,612,398	: 4,730,666	: 4,858,900	: 102.7
	:	:	:	:	:

COTTON

The condition of the Egyptian cotton crop on July 1 was 97 per cent of the average for the last ten years, and the same as the condition on that date in 1925. According to trade reports the water supply is considered adequate and the heat destroyed the leaf worm.

Some trade reports from India are skeptical of the official forecast of a normal rainfall in most of India, pointing out that the opening of the monsoon was not vigorous. It is admitted, however, that the monsoon has not yet progressed far enough to give much indication of its effect on the crops, including cotton.

In Lower California the condition of the cotton crop was 95 per cent of normal on June 25 compared with 110 per cent of normal at that time last year, according to the United States Crop Reporting Board. The crop in the Laguna district was in excellent condition the first part of May according to reports from the consulate at Mexico City.

The acreage of the Peruvian crop now beginning to be harvested is reported by local dealers to be 3 to 5 per cent greater than last year, according to Consul George Makinson. It is not certain whether the Piura acreage for the crop just harvested is included in this total or not. The harvest in Piura is usually from January to March and is sometimes considered as being part of the crop harvested in the previous May to December for southern Peru. Consul Makinson states further that picking is well under

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way in southern Peru and that the grade of the present crop is high, comparing favorably with the best on record. The color, he says, is also satisfactory and better than last year due partly to the dry weather following the opening of the bolls and partly to more careful picking. The staple is said to be shorter than in the previous season, most of the Tanguis variety measuring from 1-3/16 to 1-1/4 inches whereas in previous years it averaged 1-3/8 inches. Local brokers expect the crop to be somewhat larger than the 1925-26 crop of 195,000 bales of 478 pounds net. A statement covering the cotton situation in Colombia appears on page 59.

COTTON: Acreage and production in bales of 478 pounds net,
average 1909-13, annual 1924 - 1926

Country	:Average		:		: 1926		:Per cent (Prelim- inary) :of 1925	
	:1909-13		: 1924		: 1925			
	:	:	:	:	:	:		
AREA	:	1,000	:	1,000	:	1,000	:Per cent	
	:	acres	:	acres	:	acres	:	
	:	:	:	:	:	:	:	
United States, area harvested	:	34,152	:	41,360	:	45,945	:a/48,898:b/ 1,017	
Estimated world total excluding:	:		:		:		:	
China	:	62,500	:	76,000	:		:	
	:	:	:	:	:	:	:	
PRODUCTION	:	1,000	:	1,000	:	1,000	:Per cent	
	:	bales	:	bales	:	bales	:	
	:	:	:	:	:	:	(Forecast)	
United States	:	13,033	:	13,628	:	16,086	: 15,635: 97.2	
Estimated world total including:	:		:		:		:	
China.....	:	20,859	:	24,800	:	27,900	:	
	:	:	:	:	:	:	:	

a/ Area in the United States is that in cultivation June 25. If the per cent of cotton area abandoned during this season should be equal to the average for the last ten years the area which would remain to be harvested this year would be 47,153,000 acres. b/ Per cent of area in cultivation on June 25, 1925.

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HELP

Unofficial information received through the International Institute of Agriculture at Rome mentions good prospects for the quantity of hemp fiber to be harvested in Italy this year, and excellent prospects as far as quality is concerned. Large supplies of the best quality are expected. Since acreage is considerably below last year, however, this report on harvest prospects is not interpreted to mean that the crop will approach last year's large production.

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LIVESTOCK, MEAT AND WOOL

Cattle and beef

FRENCH LIVESTOCK IN 1925: Figures covering the number of livestock in France on December 31, 1925, show increases in cattle, sheep, goats and horses, with decreased in other kinds of animals. See table on page 62.

AUSTRALIAN BEEF SITUATION: All works in the central and southern divisions of Australia are operating, states the Australian Shipping Bulletin for May 31. Killings, however, are a good deal short of 1925 as a result of drought and the consequent difficulty in buying fat stock. The Wyndham works in Western Australia have commenced operations, and with improved feed conditions there, a substantial killing is expected. The heaviest Australian beef exports are usually made during the period April to September or October.

CATTLE SLAUGHTERING IN ARGENTINA AND URUGUAY: Argentine cattle slaughterings in packing plants for the first 4 months of 1926 numbered 1,054,000 head against 1,344,000 head for the same period of 1925, showing decrease of 22 per cent. Conversely, in Uruguay cattle slaughterings for the same months of 1926, at 349,000 head, show an increase of 18 per cent over the 296,000 head killed during the corresponding months of 1925.

Sheep and wool

DATE SET FOR OPENING AUSTRALIAN WOOL SEASON: The 1926 - 27 wool season will open officially with the first sales at Sydney on August 30, according to advices from E. A. Foley, American Agricultural Commissioner at London.

GOOD LAMB CROP IN ALBERTA, CANADA: A uniformly good lamb crop is reported everywhere among the range flocks in Alberta. With an exceptionally favorable winter and good spring pastures, the sheep are in good condition and the lambs have made an excellent start, according to W.H.J. Tinsdale of the Canadian Cooperative Wool Growers' Association. Prior to the recent rains, immediate pasture possibilities were in doubt. In some sections there was a decided shortage of water and pastures were badly burned. One of the outstanding features noted is the development of the sheep business in the southern part of the province. In certain districts, where formerly there were only two or three small flocks, there are now from 3,000 to 4,000 sheep. Indications are that the major part of the Alberta wool clip will be graded and sold through the several sheep breeders' and wool growers' associations. The estimated yield for the range areas is 1,000,000 pounds.

LAMBING IN NEW SOUTH WALES: The lambing in New South Wales, Australia, promises to be a record one this year. Timely rains followed by generally good weather were very favorable, according to "Cold Storage" for June 17, 1926. With a record lambing stock, owners may face a serious problem in the disposing of surplus mutton at satisfactory prices.

MUTTON AND LAMB IN AUSTRALIA: April clearances of Australian mutton and lamb were almost negligible, according to the Australian Shipping Bulletin of May 31. Only one packing plant in Queensland has been operating and none in

LIVESTOCK, MEAT AND WOOL, CONT'D

New South Wales or Victoria. There was little indication of a resumption of activity on an important scale in the near future, since improved feed conditions were discouraging growers from bringing ^{up} stock to market as long as there were sufficient supplies in cold storage to cover local needs and export orders. Smithfield movements were reported to be all against Australian consignments at that time. Large scale shipments will probably not be resumed before September.

SHEEP SLAUGHTERING IN ARGENTINA AND URUGUAY: For the first 4 months of 1926 the number of sheep slaughtered in Argentine packing plants was 985,000 head against 1,436,000 head for the same period of 1925, registering a decrease of 34 per cent. In Uruguay, however, a large increase is noted for the 1926 period, 707,000 head being killed against only 207,000 head last year for the same period. The increase is attributed partly to scant pasturage in January and February and partly to the large increase in flocks from the last lambing season.

TUNISIAN SHEEP EXPORTED TO GREECE: The announcement that a Tunisian exporter had signed a contract to furnish 30,000 sheep to Greece has called forth severe criticism from the local press, states Consul Leland Smith at Tunis. It has been ascertained that already 30,000 have been exported since January 1 and that the prices of lamb and mutton had reached the highest levels known in the local market. The government is called upon to stop all exportation until prices have returned to normal. The butchers claim that a large surplus of sheep is available on account of the favorable livestock seasons of the last two years and that the reason for high prices is the depreciation of the franc and not a lack of sheep. Protest is also made against the shipping of unshorn sheep.

ALMOND PROSPECTS OF THE BARI DISTRICT, ITALY

Forecasts of this year's almond production in the Bari district vary widely reports Trade Commissioner Livengood in a cable to the Department of Commerce. The Provincial School of Agriculture places the crop at 200,000 bags (of 220 lbs. each) of nuts in the shell which is equivalent to less than 50,000 bags of shelled nuts. Exporters claim this is much too low and predict at least 500,000 bags of kernels. Last year's crop was very poor, being only 70,000 bags of shelled nuts. Consul Cruger of Messina also reports an estimate of between 300,000 and 400,000 bags of shelled nuts. He states that the new crop can be considered out of danger. Heavy storms the last week of May probably did little harm. The weak almonds were thrown down and those remaining on the trees may be considered as the future crop.

Commissioner Livengood reports that a trip through the orchards of the district showed the trees in good condition with production spotted but prospects generally reported better than last year. He states that in his estimation the figure given by the School of Agriculture is too low but in view of past crops he hesitates to accept the high figure given by exporters.

FOREIGN BUTTER MARKETS SHOW LITTLE CHANGE

Butter quotations in the principal foreign markets showed generally little change on July 8, from those of a week earlier, according to reports from American Agricultural Commissioners on that date. Remaining unchanged were the Copenhagen official quotation at the equivalent of 34.4 cents per pound, Berlin official quotation at 35.2 cents and London at 37.5 cents on Danish. Colonial in London was a shade higher at 36.5 to 37.2 cents. Meanwhile the quotation on 92 score at New York declined one cent to 40.0 cents per pound, thus narrowing the margin over Copenhagen to 5.6 cents per pound with the tariff still effective. A detailed statement of prices appears on page 64.

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LOWER ENGLISH PRICES FOR AUSTRALASIAN APPLES

The London and Liverpool markets were very much over supplied with Australasian apples the last week in June and prices sagged, as a consequence, reports Mr. E. A. Foley, American Agricultural Commissioner at London. The market situation for Australasian apples was further weakened by the growing supplies of soft fruits from domestic and continental sources.

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NORTHERN HEMISPHERE FRUIT PROSPECTS, FOR 1926

Prospects are good for practically all deciduous fruits in the United States and Canada while in England and Continental Europe conditions are on the whole only average or below. Prospects for pears are generally better than apple prospects, according to official reports, cables and consular reports received in the Department of Agriculture.

Apples

The United States and Canada, the most important surplus apple producing countries, report favorable conditions for the coming apple crop. The total 1926 apple crop of the United States according to the July forecast will be about 69,300,000 barrels and the commercial crop 37,500,000 barrels. Last year the total crop as finally estimated was 57,300,000 barrels and the commercial crop 33,000,000 barrels.

In Canada, with favorable weather conditions, it is anticipated, according to the Fruit Branch of the Canadian Department of Agriculture that this year's apple crop will be at least equal to the 1925 commercial crop of 2,723,000 barrels and perhaps reach the 5 year average of 3,515,000 barrels. A yield equal to the record harvest of 1923 is expected in British Columbia and the season is a week to ten days earlier than usual. Blossoming was patchy in Ontario and the yield is not expected to be more than 80 per cent of last year. Should the size and quality be improved, however, as a consequence of the lighter blossoming the crop may equal last year's commercial output of 950,138 barrels. The light yields are expected in the Spy and McIntosh varieties. Blossoming in Quebec indicates a heavy yield especially in the late varieties. Conditions in New Brunswick indicate a large crop,

NORTHERN HEMISPHERE FRUIT PROSPECTS FOR 1926, CONT'D

reports Consul Johnson at Fredericton in a report of June 24. Based on the appearance of the trees on June 23, a commercial crop of about 40,000 barrels is estimated by the New Brunswick Provincial Department of Agriculture. The average crop for the last five year's has been 31,850 barrels. New Brunswick is the least important of the apple producing provinces. Canadian apple production has been falling off steadily since 1920.

The United Kingdom is the important consuming country for the surplus of North America and Australia. The production for England and Wales amounted to 3,738,000 barrels in 1924 and 3,609,000 in 1923, the only years for which figures are available. This is quite inadequate in supplying the demands of the country. Conditions for apples at present are not promising, according to a cable just received from Commissioner Foley. Pearnains show up better than other varieties and promise a crop 75 per cent of normal in Cambridgeshire and 50 per cent in Gloucestershire, in other districts they run about 20 or 25 per cent while all other varieties are light or practically a failure. The crop in Kent, the most important apple producing region, is reported as only 20 per cent or less.

Germany, the other important importing country, will have a small to medium crop according to present indications, reports Commissioner Foley.

Switzerland and the Italian Tyrol report prospects of a good crop. In Belgium, Czechoslovakia and Holland only a half crop is expected while conditions in Austria are reported below average, according to a cable from Commissioner Haas. No reports have been received for France or Yugoslavia both fairly important producers for home consumption. See page 51 for table of apple production for previous years.

Pears

The outlook for the pear crops of this season is fairly promising. The July estimate for the United States places the crop at 24,600,000 bushels compared with 19,820 thousand bushels in 1925. In Canada pears give promise of a full crop in British Columbia where last year's crop was a failure while in Ontario the bloom was good in the commercial sections, indicating a crop equal to last year.

Pears showed only a fair set in England, Hazel being the most promising and indicating a 75 per cent of normal yield in several districts including Wisbech, Cambridgeshire and Herefordshire. Sovereigns promise 75 per cent in Worcestershire but most varieties indicate from 25 to 50 per cent yields in the various districts, reports Commissioner Foley.

On the continent prospects are reported good in Belgium, Holland and Swiss Tyrol but only average in Switzerland as a whole. In the Italian Tyrol a medium crop is expected, while conditions are above normal in Germany. The pears of the Rhone and Loire valleys of France promise large crops but in the Paris district the outlook is medium. Conditions in Czechoslovakia are varied but most varieties promise a good half crop. The Austrian crop is below average.

NORTHERN HEMISPHERE FRUIT PROSPECTS FOR 1926, CONT'D

Plums and Prunes

European plum prospects are varied but a fair crop may be expected reports Agricultural Commissioner Foley in a cable to the Department of Agriculture. Conditions are fair in Yugoslavia, which supplies a large share of Europe's prunes. The crop in that country is a big factor in governing the European demand for supplies from California, Oregon and other exporting states of the United States. Early conditions were very favorable and no damage was reported from cold. A cable from Commissioner Haas the beginning of June, however, stated that some damage had been done by disease and wind. The crop in Serbia, the most important producing region is not as good as that of Bosnia. The export forecast is placed at 4,000 cars or 44,000 short tons which is about equal to last seasons exports. The outlook was irregular in France. Conditions in Dordogne were fairly normal but other districts report poor to medium conditions, Mr. Foley states. The crop in Czechoslovakia the beginning of June was average according to a cable from Commissioner Haas.

The harvest in Canada is believed to be slightly larger than last year, a small increase being expected in the crop of British Columbia while in Ontario the crop is expected to be 25 per cent above last year. In England the plum outlook after the fruit had set was patchy. Victorias were good, Czars good in Kent and Norfolk, Greengages poor generally and Damsons promising well in a few places. The condition of prunes on July 1 was 60% of normal in California while at that time last year it was 66%.

Plum production in countries reporting in 1925 and earlier years appears on page 63.

Cherries

The outlook for cherries in Canada was promising up to the beginning of harvest while in southern Italy the harvest is better than last year. In Czechoslovakia damage from frost reduced the crop below average and in England the set was disappointing.

Dried Fruit

Conditions in Spain point to a reduced crop of raisin grapes this year in Malaga where 2/3 of the raisin crop of Spain is produced, according to Consul Austin Brady at Malaga. On the basis of July 1 conditions the production of all grapes in the United States is forecast at 2,440,000 short tons, while last year the amount actually harvested was estimated at 1,970,000 short tons.

Fruit crops in Smyrna, including Sultanas and figs, give promise of substantially larger yields than last year, according to a report received from Trade Commissioner Gillespie at Constantinople. Estimates for the coming crop of Sultanas vary between 45,000 and 50,000 short tons compared with the low yield of 31,970 short tons last year while the fig crop is estimated between 27,000 and 29,000 short tons compared with 21,600 short tons last year.

NORTHERN HEMISPHERE FRUIT PROSPECTS FOR 1926, CONT'D.

APPLES: Production in countries reporting 1921-1925 a/

Country	1921	1922	1923	1924	1925
	Barrels	Barrels	Barrels	Barrels	Barrels
NORTHERN HEMISPHERE					
United States					
Total crop	53,000,667	67,567,333	67,614,000	59,700,333	57,300,000
Commercial	21,557,000	31,945,000	35,936,000	28,587,000	33,000,000
Canada, Commercial	4,165,527	3,889,541	3,838,641	2,955,492	2,729,455
England and Wales			3,609,000	2,738,000	
France b/	2,607,154	5,391,870	3,416,165	5,772,929	
Czechoslovakia	2,554,202	4,929,988	2,838,934	3,664,354	
Yugoslavia	2,335,853	2,681,386	2,098,305	2,767,528	
Bulgaria	2,560	2,851			
Italy	2,742,000				
Switzerland	1,113,161	3,696,995	550,667	1,690,333	341,000
Chosen	147,628	149,520	182,090	225,252	
Japan	416,687	992,023	459,362		
SOUTHERN HEMISPHERE					
Chile	55,708	133,366			
Australia	2,182,045	2,399,783	1,947,426		
New Zealand, commercial:	329,871	489,748	465,633	521,085	
U. of S. Africa, dried apples	164,900	422,377	275,100		
Total countries report- ing 1921 to 1924	67,811,063	120,741,381	116,940,435	105,284,306	

Compiled from official sources and consular reports.

a/ Production as reported is for the calendar year in the Northern Hemisphere and the succeeding harvest in the Southern Hemisphere.

b/ Pears and apples for table use.

CRAPES: Acreage in specified countries, average 1909-13,
annual 1921-1925

Country	1909-13	1921	1922	1923	1924	1925
	Acres	Acres	Acres	Acres	Acres	Acres
France -						
Wine grapes....	7,946,836	3,748,168	3,772,327	3,796,926	3,755,129	
Table "		56,732	47,740	48,656	46,801	
Spain	3,157,725	3,287,698	3,312,840	3,315,306	3,314,328	3,343,270
Italy.....	a/10,959,600	10,422,200	10,559,800	10,558,600	10,567,700	10,587,500
Australia.....	51,382	66,789	73,883	82,557		
Yugoslavia.....		424,113	414,414	412,128	408,755	
Germany.....	b/ 198,760	182,462	183,744	184,526	183,699	181,060

Official sources

a/ Four year average 1910-1913.

b/ Three year average 1911-13 for territory comparable with 1925.

NORTHERN HEMISPHERE FRUIT PROSPECTS FOR 1926, CONT'D

GRAPES: Production in specified countries average 1909-13 annual 1921-1925

Country	1909-13	1921	1922	1923	1924	1925
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
	: pounds	: pounds				
United States -						
Total			4,152,342	4,454,790	3,527,484	3,934,320
California -						
Table grapes		420,000	616,000	884,000	960,000	
Wine grapes		620,000	900,000	856,000	700,000	
Total grapes					3,070,000	3,634,000
France -						
Wine grapes a/	16,284,800	16,792,400	26,915,000	21,001,800	24,842,000	
Table "		197,252	193,346	191,141	198,936	
Spain, total	5,839,523	7,338,704	9,150,055	8,229,667	8,313,722	9,716,000
Italy, total	15,645,000	11,036,900	12,422,900	18,485,100	15,669,200	
Australia -						
Total	195,156	336,818	451,414	616,088		
Table	30,238	21,306	24,740	25,682		
For raisins and currants						
Yugoslavia -						
Wine grapes a/		1,104,100	1,600,300	1,547,400	1,023,000	
Germany -						
Wine grapes a/	b/ 542,600	615,183	1,194,034	277,298	632,000	557,702

a/ Figures of wine grape production are rough estimates calculated from the wine production of the country, using the average grape equivalent per hectoliter of wine obtained in Spain for the years 1916-1925. b/ Three year average 1911-1913 for territory comparable with 1925. Official sources.

RAISINS AND CURRENTS: Production in specified countries

Country	1909-13	1921	1922	1923	1924	1925
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
	: pounds	: pounds	: pounds	: pounds	: pounds	: pounds
United States (Calif.)						
Australia -						
Raisins		30,242	41,752	66,125	56,581	a/ 60,000
Currants	b/ 25,028	18,159	23,509	34,081	26,100	27,000
Greece, currants	413,400	259,000	257,000	212,000	336,600	297,000
Smyrna, raisins	105,115	74,700	82,500	88,800	114,200	70,500
Turkey (Constantinople District)						
Spain b/	b/ 37,243	35,673	33,248	28,331	45,150	46,056
Total above countries excluding Turkey ...		707,774	912,009	1,009,337	918,631	860,556

a/ Preliminary. b/ Figures for raisin production of Spain are rough estimates based on the amount of grapes destined for raisin production using 4 pounds of grapes equal to 1 pound of raisins as reported by Mr. Kaufman, United States Agricultural Statistician of Southern California, August 22, 1925.

July 12, 1926

Foreign Crops and Markets

NORTHERN HEMISPHERE FRUIT PROSPECTS FOR 1926. ^{July 17th}

PLUMS AND PRUNES: Production in specified countries

Country	1909-13	1921	1922	1923	1924	1925
	: 1,000 : 1,000 : 1,000 : 1,000 : 1,000 : 1,000 : 1,000					
	: pounds : pounds : pounds : pounds : pounds : pounds					
United States -						
Total dried. a/ ..						
California -						
Dried prunes a/ ..	131,000	200,000	220,000	260,000	278,000	280,000
Plums b/	1,020	84,000	96,000	138,000	76,000	102,000
Yugoslavia c/		1,763,892	1,871,776	1,970,172	709,959	
Czechoslovakia		721,298	1,124,074	740,405	523,799	
France, total	68,228	26,501	97,781	202,168	117,671	
Plums for drying	40,076	12,867	4,713	59,434	16,620	a/ 9,000
Rumania						
Bulgaria		63,455	35,860			
Italy				1,000	2,000	2,000
Chile, dried plums. :		419	756			
Union of South Africa,						
dried plums :e/	641	1,946	1,312	2,923		
Australia f/	33,337	38,902	37,388			

a/ On the average, about 2 1/2 pounds of fresh fruit are required to make one pound of prunes. b/ Excludes plums for drying. c/ From 30 to 40 per cent of the plum crop is dried under normal conditions but the stocks of prune brandy are cared for before any drying is done according to Edwin Smith, United States Foreign Marketing Specialist. d/ Figure furnished by Trade Commissioner Hynes for the Bordeaux Prune d'Ente crop is 3,600,000 pounds dried basis which would be roughly about 9,000,000 pounds fresh plums. The Bordeaux region is the only one in France producing plums for prunes in commercial quantities. e/ One year 1910-11. f/ Reduced from bushels on the basis of 50 pounds to the bushel the figure adopted in the United States Federal Statutes.

APRICOTS, DRIED: Production in South Africa and Australia, 1920-21 to 1923-24

Date	South Africa		Australia	
	Pounds		Pounds	
1920-21 ..1920-21.....	160,100		1,265,100	
1921-22	980,467		972,141	
1922-23	1,143,115		2,101,411	
1923-24	739,700		1,151,975	

Compiled from official yearbooks.

PROGRESS IN THE AUSTRALIAN FRUIT INDUSTRY

The production and export of fruit, both fresh and preserved, in Australia, continues to increase in importance. New Zealand also shares somewhat in that expansion. In dried and preserved fruits, especially, the Australian industry is assuming an increasingly formidable position in the foreign markets for similar American products. In the fresh fruit trade, however, a difference in seasons reduces the probability of severe competition between American and Australasian products. Recent developments in the Australasian fruit industry are included below:

Australasian apples have wider distribution

One of the significant features of the Australasian apple shipping schedule this season was the greater distribution to ports other than London. Last year about 75 per cent of the total arrivals from Australasia were unloaded at London, but this season Liverpool received a much larger share than formerly as did also Hull, Manchester and Hamburg. This new departure is the result largely of unsatisfactory returns realized in former seasons because of having concentrated too much on the London market.

Australian fruit grading regulations

At a recent meeting of the Australian Fruit Council the following amendments to the grading regulations for apples and pears were decided upon, but have not yet been gazetted by the Federal Customs Department, according to a report received from Mr. E. G. Babbitt, the American Trade Commissioner at Sydney.

(a) That the size requirements of "standard" grade be limited to fruit "not under 2 1/8 inches."

(b) That the "plain" grade be amended to the following:- Apples and pears described as "plain" shall consist of apples and pears of one variety and one size, free from broken skins and not mis-shapen, seriously blemished, or injured by any disease; but fruit slightly blemished by rubbing, black spot, fungus or caterpillars may be exported, providing that the total area covered by such blemishes on any apple or pear does not exceed the area contained in a circle having a diameter of half an inch. Russetting of the surface shall not be deemed to be a blemish if the skin is unbroken. The diameter of apples shall not in any case be less than two inches.

(c) That the regulations in force in Victoria and Tasmania regarding the sizing of apples and pears be amended as follows, and that it be a recommendation that such sizes be adopted by the various other States --

2 inches shall include fruit of 2 inches or greater diameter, but less than 2 1/4 inches.

PROGRESS IN THE AUSTRALIAN FRUIT INDUSTRY, CONT'D.

2 1/4 inches shall include fruit of 2 1/4 inches or greater diameter, but less than 2 1/2 inches.

2 1/2 inches shall include fruit of 2 1/2 inches or greater diameter, but less than 2 3/4 inches.

2 3/4 inches shall include fruit of 2 1/2 inches or greater diameter, but less than 3 inches.

"Large" shall include fruit 3 inches or over in diameter.

Australian citrus fruit exporters ask for investigation

In consequence of the failure of Australian citrus fruit to reach the London market in good condition, the Murray Citrus Growers' Association is asking the Federal Government to undertake research work into the causes of deterioration during transit, according to reports forwarded by Mr. E. A. Foley, the American Agricultural Commissioner at London. The association asks alternatively for a grant of money to enable it to investigate oversea transport operations. It is stated that unless some remedy can be found the export of citrus fruit from South Australia, Victoria, and New South Wales may either be substantially reduced or entirely discontinued, thus creating a surplus in the Australian market.

Australian dried fruit campaign

An extensive advertising campaign is being undertaken in Great Britain this year by the Australian Dried Fruits Board, according to press reports forwarded by Mr. Foley. The Dried Fruits Board is one of the largest participants in the advertising scheme to be undertaken jointly in the United Kingdom by the Commonwealth Government and Australian producers, under which the money raised by Australian producers for advertising in the United Kingdom is to be augmented pound for pound by the Australian Government, with a limitation that its contribution shall not exceed £50,000 or approximately \$315,000.

In the campaign by the Dried Fruits Board to promote the sale of Australian sultanas, raisins, and currants the greater part of the money will be spent on newspaper advertising. A special advertising manager has left Australia to conduct the campaign. Emphasis on the excellent quality of the goods will be the keynote of the campaign, it is said.

It is stated by the Australian Dried Fruits Board that the new season's crop of sultanas and currants just coming on the British market is exceptional. Weather conditions in the Murray River Valley have been excellent, and it is hoped to place on the market samples superior to any that have so far been sent to Great Britain. The quality of the currants, in particular, is said to be greatly improved.

PROGRESS IN THE AUSTRALIAN FRUIT INDUSTRY, CONT'D

Costs of production in Australian dried-fruits industry in 1912 and 1922-24

The following figures, comparing the costs of production in the Australian dried-fruits industry in 1912 and 1922-24, and quoted by a member of the House of Representatives of the Commonwealth Parliament, during a recent debate, have been received in the Department of Agriculture through Mr. E. C. Babbitt the American Trade Commissioner at Sydney. These figures relate to the clearing and developing of a virgin block of land up to the production stage.

The cost of a 15 acre block in 1912 was \$5,000 and in 1922-24 \$8,400. In other words, the average cost of development per acre was \$333 in 1912 and \$560 in 1922-24. These are some of the items:-

	<u>1912</u>	<u>1922-24</u>
	<u>Dollars</u>	<u>Dollars</u>
House and outbuildings.....	750	1,118
Racks and harvesting materials.....	195	358
Stock and implements, plough		
cultivator and tools.....	83	179
Lorry and harness.....	122	268

The costs of production on a 15-acre block for a 1 ton per acre crop in 1912 involved a total expenditure of \$1,518, and in 1924 had risen to \$2,450. These figures cover expenditure for living, harvesting, additional labor, manure and spraying material, horse feed, repairs, water rates and shire (county) taxes, depreciation on stock, implements, and vineyard, and interest. This indicates that the average cost of production per acre was \$101 in 1912, and \$163 in 1924. The average sweat-box price to the grower, which is the price of the fruit in the rough, was about \$193 per ton between 1907 and 1914, to meet a production cost of \$101. The average sweat-box price to the grower was estimated for 1924 at \$125 per ton, to meet a production cost of \$163.

Australian currant prices in South Africa

The Australian Dried Fruit Control Board has fixed prices on currants for shipment to South Africa and it is expected that prices for Canada and the Farm East will be fixed shortly says Mr. Walter T. Costello, the American Vice Consul at Melbourne. All dried fruit crops have been harvested and the quality is reported to be much superior to that of the previous season. Prices as fixed for exporting currants to South Africa are \$9.10 per 100 lbs. for 3 crown, and \$8.45 per 100 lbs. for 2 crown, C. I. F. and exchange at sight. Trading with Canada will be conducted along the same lines as with South Africa, that is, the fruit will be exported by licensed merchants only and prices will be controlled by the Australian Dried Fruit Association Control Board.

Australia increases subsidy on canned peaches

The Australian subsidy on canned fruit as published by the Department of Agriculture on April 22, 1936, has been changed to give exporters of cling-stone peaches greater assistance, according to E. G. Babbitt, the American

PROGRESS IN THE AUSTRALIAN FRUIT INDUSTRY, CONT'D

Trade Commissioner at Sydney. It first a subsidy of only 6¢ was to be given on exports of every dozen 30 ounce cans of clingstone peaches, but this has been changed to 24¢ for every dozen cans exported. Exporters of apricots will still receive a bounty of 13¢ for every dozen 30 ounce cans exported. The bounty will be paid only on fruit that is exported to the United Kingdom and on conditions that packers pay growers not less than £ 10 per long ton (\$45.40 per short ton) for the fresh fruit.

The production of canned peaches in Australia during 1925 amounted to 1,287,000 dozen 30 ounce cans, says Mr. Julian B. Foster, the American Trade Commissioner at Melbourne, and it is estimated that this year's production will equal that of 1925. It is believed, however, that there will be a substantial decrease in the 1926 production of canned pears and apricots. In 1925 about 538,000 dozen cans of pears and 415,000 dozen cans of apricots were produced.

THE SMYRNA RAISIN SITUATION

Although no official figures on the 1925 crop of Smyrna Sultana raisins have been compiled, most estimates place the yield at 63 to 65 million pounds (31,000 to 32,000 short tons), according to a report by Charles A. Livengood, American Trade Commissioner at Rome, received in the Department of Agriculture. The 1924 crop amounted to about 115 million pounds, or 57,000 to 58,000 short tons. The bulk of the 1925 crop has been disposed of and it is estimated that stocks in the Smyrna region on April 1 amounted to only about 4,500,000 pounds. The trade predicted that these would be entirely disposed of before the opening of the new season in August.

In view of the stock situation, the progress of prices and prospects for the new crop will be the most important factors in the situation during the next few months. One member of the Smyrna trade late in March expressed the opinion that with the outlook at that time, the 1926 production might exceed 45,000 short tons. This estimate, according to Mr. Livengood, should be taken, however, only as an indication that the outlook was considered favorable. The member of the trade referred to above states that conditions during the winter months were generally favorable to the vines. Consul S. W. Honaker at Smyrna reports that a considerable amount of rain, greatly needed to promote growing conditions, fell during the first three weeks of March. A cold spell was experienced during the latter part of the month but no reports of any damage have been received. The Consul also states that raisin settings, up to the end of March, were in very fair condition and adds, "It is impossible to make a statement at this early period of the year (April 1) in regard to prospects, but the continuation of favorable conditions would point to a large yield in 1926".

THE SMYRNA RAISIN SITUATION, CONT'D

As a result of the small 1925 crop, sales of raisins on the Raisin Exchange in Smyrna up to the end of March reached a total of only 184,368 bags of about 300 pounds each, as compared with 319,035 bags during the corresponding period of the 1924-25 season, according to Consul Honaker. While sales on the Smyrna Exchange do not represent actual exports, they are an indication of the movements of the crop into hands where it becomes available for exportation. An analysis of the monthly sales shows that there is a tendency for disposing of a large percentage of the crop during the first three months of the season, that is, August to October.

In the absence of official export statistics the following table compiled from commercial sources will serve to indicate the distribution of the raisins shipped from Smyrna from the beginning of the season to the dates specified:

Destination	From August 1, 1925 to			
	October 3	October 31	December 5	February 28
	Pounds	Pounds	Pounds	Pounds
United Kingdom.....	5,241,600	6,585,600	8,919,680	14,291,200
Continent.....	17,740,800	23,072,000	26,104,960	35,235,200
United States, Canada : and others.....	582,400	716,800	943,040	1,556,800
Total	23,564,800	30,374,400	35,967,680	51,083,200

Quotations for Sultanas in Smyrna have continued throughout the season at a relatively high level and prices quoted in Turkish money have shown comparatively little fluctuation. However, as the value of Turkish exchange declined from a high level of \$0.58 1/2 to the Turkish Pound in August to a low point of \$0.49 1/2 in March, prices reduced to American equivalents showed some fluctuation. Prices on first quality raisins delivered at packer's warehouses have ranged as follows in cents per pound: September 11.6 - 12.4, November 10.8 - 11.4, January 10.1 - 10.7, March 9 - 10.5.

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CANADIAN FARMERS WANT SEASONAL TARIFF ON FRUITS AND VEGETABLES

British Columbia fruit interests in cooperation with growers and shippers of Eastern Canada are preparing recommendations to be submitted to the Canadian Tariff Commissioner for a seasonal tariff on imports of fruits and vegetables. It is proposed to levy a tariff on such fruits and vegetables as are grown in Canada, to become effective three weeks before Canadian supplies will be available, thus clearing the market for domestic grown supplies. The seasonal tariff will remain in effect, it is suggested, until two or three weeks after Canadian supplies have been exhausted. American fruits and vegetables would have a comparatively free field up until homegrown produce is available.

BARLEY OUTLOOK IN THE NORTHERN HEMISPHERE.

There are not enough estimates of either barley acreage or production to give a definite indication of the harvest of the current season. Production forecasts have been received to date for only 5 countries. The total for Spain, Bulgaria, Algeria, Morocco and Tunis is forecast at 172,137,000 compared with the estimated production of 196,598,000 bushels in those countries last year when their crop comprised 14 per cent of the world total excluding Russia.

Acreage estimates for 11 countries of the Northern Hemisphere amount to 98 per cent of the acreage reported for those same countries last year. These countries in 1925 accounted for about 29 per cent of the total world acreage exclusive of Russia. Growing conditions are generally reported as favorable although not necessarily equal to the excellent conditions last year. The condition of the barley crop in Canada was favorable through June.

The condition of the European barley crop is generally good. Winter barley in Germany on June 1 was slightly above average but not as good as last year while spring barley also showed a condition better than last year. Germany had general rains during the early part of June and drought was for the most part relieved. A satisfactory condition of nearly all grain crops was reported about the middle of June. Poland's winter barley is also above average but not as good as last year whereas spring barley shows a slight improvement over last year.

The conditions of barley in Austria, Czechoslovakia and Hungary on June 1 were above average and slightly better than last year. Barley in Rumania about the middle of June was satisfactory and a good harvest was expected. The quality will naturally depend upon the weather experienced in gathering the crops. The English crop has improved in the past two weeks when the weather was fair and bright after three weeks of rain.

No definite report is available on barley conditions in Russia. Practically all reports have indicated that the outlook for cereal crops generally is promising in the most important grain producing sections. Spring crops in the Ukraine were reported on June 12 to be slightly better than at the same date last year.

Barley in Algeria was reported as average in April whereas last year at the same time the crop was expected to be a good one.

BARLEY: Acreage in Specified countries average 1909-13,
annual 1924 - 1926

Country	Average :		: 1926		: Per cent is of 1925	
	: 1909- : 1924		: 1925			
	: 13 :		:			
	: 1,000	: 1,000	: 1,000	: 1,000	: Per cent	
	: acres	: acres	: acres	: acres	:	
Norway	: 89	: 136	: 139	: 139	: 100.0	
Luxemburg	: 3	: 9	: 9	: 7	: 77.8	
France	: 1,987	: 1,765	: 1,632	: 1,731	: 106.1	
Spain	: 3,510	: 4,344	: 4,414	: 4,366	: 98.9	
Italy	: 647	: 573	: 576	: 593	: 103.0	
Czechoslovakia	: 2,275	: 1,676	: 1,718	: 1,735	: 101.0	
Yugoslavia	: 1,058	: 899	: 883	: 508	: 57.5	
Bulgaria	: 516	: 525	: 544	: 535	: 98.3	
Morocco	: 3,000	: 3,120	: 3,361	: 3,385	: 100.7	
Algeria	: 3,395	: 3,158	: 3,327	: 3,190	: 95.9	
Tunis	: 1,228	: 692	: 1,248	: 1,236	: 99.0	
	:	:	:	:	:	
Total 11 countries...	: 17,708	: 16,897	: 17,851	: 17,425	: 97.6	
Estimated world total :	:	:	:	:	:	
excluding Russia ..	: 59,900	: 57,700	: 61,900	:	:	

BARLEY: Production in specified countries average 1909-13,
annual 1924 - 1926

Country	Average :		: 1926		: Per cent is of 1925	
	: 1909- : 1924		: 1925			
	: 13 :		:			
	: 1,000	: 1,000	: 1,000	: 1,000	: Per cent	
	: bushels	: bushels	: bushels	: bushels	:	
Spain	: 74,689	: 83,700	: 98,925	: 95,027	: 96.1	
Algeria	: 45,974	: 18,706	: 36,817	: 23,424	: 63.6	
Bulgaria	: 10,380	: 7,945	: 14,652	: 11,482	: 78.4	
Morocco	: (38,000)	: 53,278	: 39,315	: 36,233	: 92.2	
Tunis	: 7,826	: 2,526	: 6,889	: 5,971	: 86.7	
	:	:	:	:	:	
Total 5 countries...	: 176,869	: 166,155	: 196,598	: 172,137	: 87.5	
Estimated world total :	:	:	:	:	:	
excluding Russia ..	: 1,326,000	: 1,207,000	: 1,415,000	:	:	

THE FUTURE OF COTTON GROWING IN COLOMBIA

At the invitation of the Colombian Government a cotton mission was sent by the International Cotton Federation on a 9 weeks' journey through that country to investigate cotton growing conditions there and advise the Government on means of improving and extending the industry. The committee consisted of Mr. Arno S. Pearse, General Secretary of the International Committee of the International Cotton Federation and Arthur Foster who is President of the North Lancashire Cotton Spinners' and Manufacturers' Association and Vice Chairman of the Empire Cotton Growing Corporation.

According to Mr. Arno S. Pearse these men found cotton prospects in the Valle de Cauca to be brilliant; in Boyaca and Santander, good. Once the population on the Atlantic Coast has learned to apply itself to agricultural work, and wages have come down to a reasonable economic level, they believe that even these sections should turn out much larger quantities than they do at present. Two outstanding drawbacks noticed by the Mission were; (a) the difficulty of transportation and (b) the high wage scale of the laborers. Rapid advance has been made in road building and in ten years' time it will take only ten hours to reach the Atlantic Ocean from Medellin, while at present the transportation of goods takes as long as three weeks partly by boat, partly by rail and partly by motor. The progress achieved of late in developing the resources of Colombia, the Mission feels, has probably been at two rapid a rate as it has upset to an appreciable extent the wages and the cost of living. Cotton picking, for instance, is paid at as high a rate as in Texas. The increase in wages has apparently resulted in demoralization in the workers' standards of living and decreased efficiency.

Cotton growing on a real commercial scale in Colombia is only being carried on in the Departments of Magdalena and Atlantic but some cotton is grown in almost every one of the 14 Departments of the country. Boyaca, Santander, the Valle de Cauca and Huila are the other Departments which supply the present small cotton-spinning industry of Colombia with raw material. Though there are only 52,000 spindles in the country - spinning 12's on an average and working about 10 hours a day - yet about 25 per cent of the cotton necessary to feed these few spindles has to be imported from United States. The reason for this is that in the interior considerable domestic hand-spinning exists. In Boyaca and Santander one meets frequently women spinning on a spindle hanging loosely from the hand as they walk along the roads, in the old style of the Chibcha Indians. One also sees the spinning wheel on the verandahs of the cottages. An additional reason for the shortage is due to the carelessness of the pickers on the coast who leave probably 20 or 25 per cent of the crop on the ground.

There are some excellent cottons in Colombia, but unfortunately they are mixed with inferior ones, according to the report. Many of the cottons, if they were produced separately, would command premiums of 4 to 6 cents or more per pound over American. Some good grades are grown in the same field with 3/4 inch or 7/8 inch cotton, however, their value is considerably reduced, and probably the Colombian cotton mills are paying more for these cottons than their world's market value. Generally speaking the cotton of the country is too good for spinning such low counts as 12's, and certainly when the various kinds are being kept apart it will pay better to export these and to import lower qualities.

THE FUTURE OF COTTON GROWING IN COLOMBIA, CONT'D

Both perennial and annual cottons are grown in Colombia. Along the coast and in the hilly sections the perennial kind is grown, which lasts three or four years, giving one crop per year, or two where the rainfall is propitious. Some of these shrubs have branches up to 20 feet in length which are cut down before picking time, leaving only a small piece of bark connecting the branches with the trunk. The bolls that had not opened at the time of cutting the branches burst open very soon owing to the absence of sap, producing a large quantity of soft unripe fibre which is collected with ripe and over-ripe fibres. It was noticed in many plantations that picking was too long delayed, with the result that much cotton had fallen to the ground, to be left there for good or to be gathered with sand and other impurities. Tree cottons have certain advantages in districts where labor is scarce and dear, or where the ground is hilly and difficult to cultivate, but since tree cottons encourage insect pests and careful picking is difficult, there should be sufficient reason for cultivating the annual cotton wherever the conditions permit it. In Boyaca and Santander, two up-country Departments, annual cottons are grown, and as wages there are still reasonable these men look forward to good results from visit of the Mission. While at the present time these zones are almost cut off from the world's markets, very shortly they will be connected with the Lower Magdalena River by means of a motor road.

The most promising section for cotton growing on a large scale seems to the investigators to be the extensive plateau between the Quindio and Pacific range of the Cordillera, known as the Valle, situated at an altitude of (900 to 1,000 metres (2925 to 3250 feet)) above sea-level, with a perfectly level plain of 4,000 sq. kilometers (1500 sq. miles) and fairly industrious population of 300,000 people. The mean temperature there is about 24°C (75 F) the maximum 33° C (91° F) and minimum 17° C (63° F). There is very little change in temperature throughout the year. The rainfall is roughly 1,100 mm. (44 inches) extending over April-May and October-November. The dry months are January-February and July-August. March, June, September and December are occasionally showery. The means of communication with the sea are very good, the Pacific Railroad Company leading to the port of Buenaventura on the Pacific in four hours. The soil in the Valle is a humus, in places identical with that of the Black Waxy country of Texas. The level nature of the land makes the use of modern agricultural machinery easy; indeed, some of the larger planters have already started with tractors and disc ploughs. The population is influenced by aggressive people of the farming class; they seem to have prospered and have devoted attention to their education. The Cauca River runs from north to south and is never dry; irrigation, if needed, can easily be applied and at present is used for sugar cultivation. One of the large farmers showed the Mission his calculation of the cost of raising his cotton, from which it appeared that over the last two years it had been below 10 cents per pound on the plantation. There are several cotton fields of considerable extent in the Valle Department, but unfortunately the desire to produce the best cottons of the world has been responsible for the introduction of all kinds of seed, especially Peruvian rough, smooth and Tanguis, Egyptian, Sea Island, etc., with the natural result that the seed has become thoroughly mixed and degeneration has set in. In the opinion of the Mission, annual cotton exclusively should be

THE FUTURE OF COTTON GROWING IN COLOMBIA, CONT'D

grown in the plain of the Valle. So far it is all perennial. The importation of the various seeds has been responsible for the introduction of a pink boll-worm of a species much larger than that usually found in India or Egypt. Had it not been for this pest, cotton growing in the Valle would have developed before now on a much larger scale. The removal and burning-up of the cotton stalks at the end of each season, say six months after sowing, would have prevented this pink worm from doing anything like the damage it causes at present. The dry season of July and August provides a suitable period for picking annual cotton.

Tablelands similar to those in the Valle de Cauca exist in the Department of Tolima, and although cotton is not being grown on a commercial scale the investigators believe that it would do well there. At present tobacco is the staple crop in these plains, but owing to the encouragement of the Mission some farmers are making cotton trials on an extensive scale.

Another section which promises success is situated in the eastern part of Antioquia, through which a modern motor road is constructed, connecting the capital, Medellin, with the Atlantic Ocean.

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YUCATAN HAS HEAVY HENEQUEN STOCKS

June sisal shipments from Progreso, Yucatan, totaled 25,570 bales of which 25,100 were billed for the United States, according to cabled advices from Hernan C. Vogenitz, American Vice Consul at Progreso. Total exports from January 1 to June 30 reached 324,748 bales against 342,357 bales for the first half of 1925. Stocks at Progreso on July 1, 1926, amounted to 112,325 bales, with about 25,000 bales more at Merida and 5,000 at Campeche. Stocks on July 1, 1925, at Progreso were only 29,439 bales. Prices were unchanged on July 1, 1926, with no prospects for early sales. The industry faces the probability of an acute depression. A law has been passed by the State of Yucatan restricting the production of henequen, effective from the date of publication of the law, June 15, 1926, according to a report from Vice Consul Vogenitz. Reductions in the production are as follows:

"All planters who produce from 126,500 pounds to 253,000 pounds will reduce their production by 10%.

"All planters who produce from 253,002 pounds to 759,000 pounds will reduce their production 20%.

"All planters who produce from 759,002 pounds to 1,265,000 pounds will reduce their production 25%.

"All planters who produce 1,265,002 pounds or more will reduce their production 30%."

The basis taken for fixing the production of each planter will be the number of pounds which he may have delivered to the Sociedad de Henequeneros de Yucatan, Cooperativa, Limitada, during the first year of its operation namely from June 1, 1925 to May 31, 1926.

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GRAINS: Exports from the United States, July 1-July 3, 1924-25 and 1925-26
 PORK: Exports from the United States, July 1-July 3, 1924-25 and 1925-26

Commodity	July 1-July 3			Week ending		
			June 12	June 19	June 26	July 3
	1924-25	1925-26 a/	1926	1926	1926	1926
GRAINS:						
	1,000	1,000	1,000	1,000	1,000	1,000
	bushels	bushels	bushels	bushels	bushels	bushels
Wheat b/	195,458	62,972	1,846	1,662	1,237	1,710
Wheat flour c/d/	65,344	44,392	724	400	606	780
Rye	50,923	12,745	109	469	469	175
Corn	8,662	22,763	319	382	210	247
Oats	11,454	29,733	41	64	153	109
Barley	21,890	26,692	115	491	187	101
	Jan. 1, to	Jan. 1, to				
	July 3, 1925	July 3, 1926				
PORK:						
	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	pounds
Hams & shoulders, inc:						
Wiltshire sides ..	161,225	106,265	1,525	2,536	1,135	1,072
Bacon, including						
Cumberland sides..	109,897	96,987	3,781	3,087	2,143	2,697
Lard	386,820	380,621	9,553	11,961	7,725	12,594
Pickled pork	13,186	13,599	345	262	131	79

Compiled from official records of the Bureau of Foreign and Domestic Commerce.

a/ Revised to May 31, 1926, including exports from all ports. b/ Including via Pacific ports this week. c/ In terms of bushels of wheat. d/ includes flour milled in bond from Canadian wheat.

FRANCE: Number of livestock on Dec. 31, 1913, 1923-25

	Y			
	1913	1923	1924	1925
	present boundaries	Thousands	Thousands	Thousands
Cattle, total	15,338	13,749	14,025	14,373
Cows		7,304	7,431	7,590
Sheep	16,176	9,925	10,172	10,537
Swine	7,529	5,406	5,802	5,793
Goats	1,510	1,353	1,377	1,378
Horses	a/ 3,359	2,848	2,859	2,880
Mules	168	192	193	188
Asses	358	284	280	273

Journal Official June 17, 1926.

a/ Number in Alsace Lorraine not given for 1913 so 1912 figures have been used.

BUTTER: Prices in London, Copenhagen and New York

(By weekly cable)

Market and Item	July 1, 1926	July 8, 1926	July 9, 1925
York, 92 score	41.00	40.00	42.00
treal No. 1, pasteurized.....	33.25	33.00	b/
enhagen, official quotation	34.38	34.38	38.50
lin, la quality.....	35.22	35.22	b/
London: a/			
Danish	37.48	37.48	41.45
Dutch, unsalted	34.28	35.42	42.10
Irish	35.19	35.19	40.58
New Zealand	36.94	37.15	40.58
New Zealand	36.94	37.15	42.10
Australian	36.50	36.50	39.71
Australian, unsalted.....	b/	b/	40.80
Argentine, unsalted.....	33.24	33.90	b/
Siberian	31.98	31.28	b/
Estonian	35.19	34.55	b/

Quotations converted at exchange of the day. a/ Quotations of following day.
b/ Quotation not received.

EUROPEAN LIVESTOCK AND MEAT MARKETS
(By weekly cable)

Market and Item	Unit	Week ending		
		June 30, 1926	July 8, 1926	July 8, 1925
<u>GERMANY:</u>				
Receipts of hogs, 14 markets.....	Number	40,127	47,075	47,572
rices of hogs, Berlin	\$ per 100 lbs.	16.42	16.29	16.69
rices of lard, tcs. Hamburg.....	"	18.76	18.59	19.41
<u>UNITED KINGDOM AND IRELAND:</u>				
ogs, certain markets, England...	Number	6,547	6,226	8,332
ogs, purchases, Ireland.....	"	17,367		
rices at Liverpool:				
American Wiltshires.....	\$ per 100 lbs.	24.77	23.90	---
Canadian "	"	24.33	23.90	24.00
Danish "	"	25.64	28.95	26.03
ports, Great Britain: a/b/				
utton, frozen.....	Carcasses	38,360	167,825	
Lamb, "	"	247,212	250,432	
Peef, "	Quarters	16,015	62,535	
Beef, chilled	"	72,036	132,973	
<u>MARK:</u>				
ports, of bacon a/	1,000 lbs.	7,392	7,374	

Received through Department of Commerce. b/ Week ending Tuesday preceding date indicated.

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